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Operations Management

Section 5: Operations Management

Section 5 - 1   Update

Section 5 - 1.1   Update Operations Information

Section 5 - 1.1.1   Update Staff Data

Section 5 - 1.1.1.1   Staff Data - Main

Form: os_mtn_staff_data

Fields

Staff ID - O_STAFF_MEMBERS.STAFF_MEMBER_ID
       This field is mandatory.
       This field is system generated and 5 digits in length.
       See background processes for system generation.
Position # - O_STAFF_MEMBERS.POSITION_NUMBER
       This field is optional.
       This field is alpha-numeric and 10 digits in length. Two different Staff IDs may be assigned
       the same Position#.
Last Name - O_STAFF_MEMBERS.LAST_NAME
       This field defaults to 'vacant' if the vacant check box is checked.
       This field is mandatory.
First Name - O_STAFF_MEMBERS.FIRST_NAME
       This field defaults to 'vacant' if the vacant check box is checked.
       This field is optional.
MI1 - O_STAFF_MEMBERS.MI1
       This field is optional.
MI2 - O_STAFF_MEMBERS.MI2
       This field is optional.
Initials - Calculated from O_STAFF_MEMBERS.FIRST_NAME,
       O_STAFF_MEMBERS.LAST_NAME,
       O_STAFF_MEMBERS.MI1, O_STAFF_MEMBERS.MI2
       This field is display only.
Educational/Professional Suffix - O_STAFF_MEMBERS.ED_PROF_TITLES.
       This field is optional.
Alias – O_STAFF_MEMBERS.ALIAS
       This field is mandatory.
Street Address - O_STAFF_MEMBERS.ADDRESS1
       This field is mandatory.
       O_STAFF_MEMBERS.ADDRESS2
       This field is optional.
City - S_GEO_LOCATIONS.SC_DESCRIPTION
       Used to populate O_STAFF_MEMBERS.SGEO_GEO_LOCATION_ID
       Code table column S_GEO_LOCATIONS.GEO_LOCATION_ID
       Lov: s_geo_locations. Lov is used for validation.

This field is mandatory.

County - S_COUNTIES.DESCRIPTION from S_GEO_LOCATIONS.SC4_COUNTY_CODE
  Generated from O_STAFF_MEMBERS.SGEO_GEO_LOCATION_ID
  Code table column S_GEO_LOCATIONS.GEO_LOCATION_ID
  This field is display only.

State - S_GEO_LOCATIONS.SS_STATE_ID
  Generated from O_STAFF_MEMBERS.SGEO_GEO_LOCATION_ID
  Code table column S_GEO_LOCATIONS.GEO_LOCATION_ID
  This field is display only.

Zip Code - S_GEO_LOCATIONS.SZ_ZIP5, O_STAFF_MEMBERS.ZIP4
  Used to populate O_STAFF_MEMBERS.SGEO_GEO_LOCATION_ID
  Code table column S_GEO_LOCATIONS.GEO_LOCATION_ID
  Lov : s_geo_locations. Lov is used for validation.
  The ZIP5 field is mandatory, the ZIP4 field is optional.

E-Mail - O_STAFF_MEMBERS.EMAIL
  This field is optional.

Comment - O_STAFF_MEMBERS.NOTE
  This field is optional.

Program ID - O_JOB_DESCRIPTIONS.OP_PRG_PROGRAM_ID
  Code table column O_PROGRAMS.PROGRAM_ID
  Lov : o_programs. Lov is used for validation.
  This field is mandatory.

Description - O_PROGRAMS.DESCRIPTION
  This field is display only.

Code - O_ORGANIZATIONAL_UNITS.ORG_CODE
  The field is display only.

Organization - O_ORGANIZATIONAL_UNITS.NAME
  This field is display only.

Title - O_JOB_DESCRIPTIONS.ST_STAFF_TITLE_CODE
  Code table column O_STAFF_TITLES.STAFF_TITLE_CODE
  Description is O_STAFF_TITLES.DESCRIPTION
  Lov: o_staff_titles. Lov is used for validation.
  This field is mandatory.

Check Box(es)

Vacant - O_STAFF_MEMBERS.VACANT_FLAG
Pseudo - O_STAFF_MEMBERS.PSEUDO_FLAG
Non-WIC - O_STAFF_MEMBERS.NON_WIC_FLAG
Non-WIC Contractor - O_STAFF_MEMBER.NON_WIC_CONTR_FLAG
Local Agency Coordinator -O_STAFF_MEMBERS.LA_WIC_COORD_FLAG

Background Process(es)

Initials Field
The system uses the first letters of the information entered in the Last, First , MI1, and MI2 fields and displays them consecutively in this field. The system displays each of these letters where:

SM.INITIALS (non database table field) :=
  SUBSTR(NVL(:O_STAFF_MEMBERS.FIRST_NAME,''),1,1)||

SUBSTR(NVL(:O_STAFF_MEMBERS.MI1,''),1,1)||
SUBSTR(NVL(:O_STAFF_MEMBERS.MI2,''),1,1)||
SUBSTR(NVL(:O_STAFF_MEMBERS.LAST_NAME,''),1,1);

Vacant Check Box
If O_STAFF_MEMBERS.VACANT_FLAG = 'Y'

Then O_STAFF_MEMBERS.FIRST_NAME and O_STAFF_MEMBERS.LAST_NAME are both set to 'vacant'.

Staff ID's
The system assigns different blocks of ID's to each of the 18 local agencies/clinics with each block containing 5,000 ID's to be distributed for the new staff members added into the system. For example, it will assign 00001 to 05000 for one agency then assign 05001 to 10000 for the next agency and so forth in the STAFF_MEMBER_SEQ field within the S_APPL_SEQUENCES base table. When the user adds a record, the system will check the agency for which the staff member is being added and then assigns the next available number for that agency by using a function that grabs the number from the S_APPL_SEQUENCES base table. This value is then displayed in the Staff ID field on the screen.

Section 5 - 1.1.1.2   Staff Data - Main 2

Form: os_mtn_staff_data

Fields

Salary - O_JOB_DESCRIPTIONS.HOURLY_SALARY
        This field is mandatory.
ERE% - O_JOB_DESCRIPTIONS.ERE_PERCENT
        This field is mandatory.
Start Date - O_JOB_DESCRIPTIONS.START_DATE
        This field is required.
End Date - O_JOB_DESCRIPTIONS.END_DATE
        This field is optional.
Hrs/Wk - O_JOB_DESCRIPTIONS.WEEKLY_HOURS
        This field is mandatory.
FTE Base -O_JOB_DESCRIPTIONS.FTE_BASE
        This field is display only and displays a value of '40' representing the number of hours worked
        for a full time worker.
FTE - Calculated from O_JOB_DESCRIPTIONS.WEEKLY_HOURS divided by
        O_JOB_DESCRIPTIONS.FTE_BASE
        This field is display only.

Check Box(es)

Home Org. - O_JOB_DESCRIPTIONS.HOME_ORG_FLAG

Background Process(es)

If the FTE Base is 0, then the FTE will not be calculated. Otherwise, the FTE is calculated to two decimal places.

Section 5 - 1.1.1.3   Staff Data-Phone popup

Fields

Phone Number - O_STAFF_PHONES.PHONE_NUMBER
       This field is optional.
Ext. - O_STAFF_PHONES. PHONE_EXTENSION
       This field is optional.
Phone Type - O_STAFF_PHONES.SPT_PHONE_TYPE_CODE
       Code table column S_PHONE_TYPES.PHONE_TYPE_CODE
       Lov : s_phone_types. Lov is used for validation.
       This field is mandatory if a phone number is filled in the phone number field.

Background Process(es)

None.

Section 5 - 1.1.1.4   Staff Data-Languages popup

Fields

Primary - O_STAFF_MEMBERS.CL_LANGUAGE_CODE_PRIMARY
       Code table column C_LANGUAGES.LANGUAGE_CODE
       Description is C_LANGUAGES.DESCRIPTION
       Lov : c_languages. Lov is used for validation.
       This field is mandatory.
Secondary - O_STAFF_MEMBERS.CL_LANGUAGE_CODE_SECONDARY
       Code table column C_LANGUAGES.LANGUAGE_CODE
       Description is C_LANGUAGES.DESCRIPTION
       Lov: c_languages. Lov is used for validation.
       This field is optional.

Background Process(es)

None.

Section 5 - 1.1.1.5   Staff Data-Training popup

Fields

Date - O_STAFF_TRAININGS.TRAINING_DATE
      This field is optional.
Class Topic - O_STAFF_TRAININGS.CLASS_TOPIC
      This field is optional.
Location - O_STAFF_TRAININGS.LOCATION
      This field is optional.
Instructor - O_STAFF_TRAININGS.INSTRUCTOR
      This field is optional.
Duration - O_STAFF_TRAININGS.DURATION
      This field is optional.
Cost - O_STAFF_TRAININGS.COST
      This field is optional.

Check Box(es)

In-service - O_STAFF_TRAININGS.IN_SERVICE_FLAG
Out-service - O_STAFF_TRAININGS.OUT_SERVICE_FLAG
Nutr. Ed. - O_STAFF_TRAININGS.NUTR_ED_FLAG
Other - O_STAFF_TRAININGS.OTHER_FLAG

Push Button(s)

Next Class - Queries the O_STAFF_TRAININGS table for the TRAINING_DATE field with the next
      oldest date than the one displayed on screen.
Previous Class - Queries the O_STAFF_TRAININGS table for the TRAINING_DATE field with the
      next most recent date than the one displayed on screen.

Background Process(es)

The system displays the most recent training record stored in the system for this staff member when the
screen is initially displayed. It displays the record in the O_STAFF_TRAINING.TRAINING_DATE
field with the greatest value and navigates through the other records in descending order.

The user can navigate to more recent or older training records for a staff member by clicking the <
(previous_item) and > (next_item) VCR buttons respectively.

Operations Management

Section 5 - 1.1.2   Update Organizational Units Information

Section 5 - 1.1.2.1   Organizational Units

Form: os_mtn_org_units

Fields

Organization Code - O_ORGANZATIONAL_UNITS.ORG_CODE
      This field is mandatory.
Name - O_ORGANZATIONAL_UNITS.NAME
      This field is mandatory.
Organization Level - O_ORGANZATIONAL_UNITS.OU_TYPE
      Lov: Static (Clinic, Local Agency, State Agency)
      Default value is 'Local Agency'.
      Distribution sites will be assigned at the Clinic level.
      This field is mandatory.
FNS Identifier - O_ORGANIZATIONAL_UNITS.FNS_CODE
      This field is optional.
Elevation - O_ORGANZATIONAL_UNITS. CE_LO_ELEVATION
      Lov: c_elevations.
      Lov is used for validations.
      This field is optional.
Address - O_ORGANZATIONAL_UNITS.ADDRESS1
      This field is mandatory.
      O_ORGANZATIONAL_UNITS.ADDRESS2
      This field is optional.
City - S_GEO_LOCATIONS.SC_DESCRIPTION
      Used to populate O_ORGANZATIONAL_UNITS.SGEO_GEO_LOCATION_ID
      Code table column S_GEO_LOCATIONS.GEO_LOCATION_ID
      Lov: s_geo_locations. Lov is used for validation.
      This field is mandatory.
County - S_COUNTIES.DESCRIPTION from S_GEO_LOCATIONS.SC4_COUNTY_CODE
      Generated from O_ORGANZATIONAL_UNITS.SGEO_GEO_LOCATION_ID
      Code table column S_GEO_LOCATIONS.GEO_LOCATION_ID
      This field is display only.
State - S_GEO_LOCATIONS.SS_STATE_ID
      Generated from O_ORGANZATIONAL_UNITS.SGEO_GEO_LOCATION_ID
      Code table column S_GEO_LOCATIONS.GEO_LOCATION_ID
      This field is display only.
Zip Code - S_GEO_LOCATIONS.SZ_ZIP5, O_ORGANZATIONAL_UNITS.ZIP4
      Used to populate O_ORGANZATIONAL_UNITS.SGEO_GEO_LOCATION_ID Code table
      column S_GEO_LOCATION.GEO_LOCATION_ID
      Lov: s_zips. Lov is used for validation.
      The ZIP5 field is mandatory, the ZIP4 is optional.
Parent Org. Code - O_ORGANZATIONAL_UNITS.ORG_CODE

Lov: o_organizational_units. Generated from O_ORGANIZATIONAL_UNITS.OU_SEQ_ID
This field is mandatory except for the state agency.

Name - O_ORGANIZATIONAL_UNITS.NAME Calculated from
O_ORGANIZATIONAL_UNITS.SEQ_ID
This field is display only.

WIC Office Space - O_ORGANIZATIONAL_UNITS.OFFICE_SPACE
This field is optional.
Default value is 1.

Measuring Unit - O_ORGANIZATIONAL_UNITS.MEASURING_UNIT
Lov: Static (English(E) or Metric(M)). Default is (E).
This field is optional.

Food Package Prefix - O_ORGANIZATIONAL_UNITS.FP_PREFIX.
This field is generated and stored in the database, see background processes.
This field is display only. *This field is no longer used per Tracker 2943.*

E-Mail - O_ORGANIZATIONAL_UNITS.E_MAIL
This field is optional.

Comment - O_ORGANZATIONAL_UNITS.NOTE
This field is optional.

Background Process(es)

Upon creation of a new clinic in this screen, the following sequences need to created through SQL*Plus
for the clinic in the S_APPL_SEQUENCES table:

BATCH_RUN_SEQ
C_P_COUNS_NOTE_SEQ
FAMILY_ECONOMIC_UNIT_SEQ
INCOME_HISTORY_SEQ
INCOME_SEQ
INFANT_DATA_ID_SEQ
OUTREACH_ORG_SEQ
STAFF_MEMBER_SEQ
TRANSFER_SEQ
UNVOID_AUDIT_TRAIL_SEQ
UNWAITLIST_AUDIT_TRAIL_SEQ
WL_CONTACT_SEQ

The sequence start and end numbers must be a unique range of numbers for each clinic in the state.

Food Package Prefix Field – *This field is no longer used per Tracker 2943.*
The parameter.prefix_flag's default value is 'N', so when a user enters a form, the initial value equals
'N'. Also, whenever a user tries to tab into the prefix field when there is no value, the system
automatically sets the value of the parameter.prefix_flag to 'N'.

When the prefix flag indicates that a Food Package Prefix needs to be generated (parameter.prefix_flag
= 'N'), the system generates a one digit alpha numeric
code(O_ORGANIZATIONAL_UNITS.FP_PREFIX) for the new agency or clinic. The system loops
through the existing Food Package Prefix's that have been used and populates the new item with the next
available code by selecting O_ORGANIZATIONAL_UNITS.FP_PREFIX for the particular organization
type and sequence id, and then fetching this value into a variable that holds the value(hold_fp_prefix) for

the loop. The system will exit the loop when no more values are found for hold_fp_prefix and sets this value equal to a variable last_val.   If last_val has no value then the system starts with the alpha numeric character 'A', otherwise it selects the last_value found and increments it by one. For example, if the last prefix used was 'B' then the system selects 'C' for the new prefix and assigns it to the agency or clinic. This prefix is stored in O_ORGANIZATIONAL_UNITS.FP_PREFIX but the system displays on the screen the agency or clinics O_ORGANIZATIONAL_UNIT.ORG_CODE.
The food package prefix is only generated when a user enters a Local Agency,
Local Agency or a WIC Clinic and saves that record to the database.

The system populates the Name field next to the Parent Org. Code field after the user selects a parent organization code from the O_ORGANIZATIONAL_UNITS LOV.

Section 5 - 1.1.2.2   Organizational Units-Contact Info popup

Fields

Staff ID - O_ORGANIZATIONAL_UNITS.SM_STAFF_MEMBER_ID
        Code table column O_STAFF_MEMBERS.STAFF_MEMBER_ID
        Lov: o_staff_members. Lov is used for validation.
        This field is mandatory.
Last Name - O_STAFF_MEMBERS. LAST_NAME Calculated from
        O_ORGANIZATIONAL_UNITS.SM_STAFF_MEMBER_ID
        This field is display only.
First Name - O_STAFF_MEMBERS.FIRST_NAME Calculated from
        O_ORGANIZATIONAL_UNITS.SM_STAFF_MEMBER_ID
        This field is display only.
Title - O_STAFF_TITLES.DESCRIPTION Calculated from
        O_JOB_DESCRIPTIONS.ST_STAFF_TITLE_CODE
        This field is display only.
Comment - O_JOB_DESCRIPTIONS.OST_NOTE
        Code table column O_STAFF_TITLES.NOTE
        Calculated from O_JOB_DESCRIPTIONS.SM_STAFF_MEMBER_ID
        Code table column O_STAFF_MEMBERS.STAFF_MEMBER_ID
        This field is display only.

Background Process(es)

The system populates the Last Name, First Name, Title and Comment fields with the appropriate Staff Data table information based upon the Staff ID selected by the user. These fields are populated immediately after the Staff ID field is populated.

Allows user to populate STAFF_ID, LAST_NAME, FIRST_NAME, TITLE, and COMMENT fields.

Section 5 - 1.1.2.3 Organizational Units-Contact Info-Phone popup

Fields

Phone Number - O_STAFF_PHONES.PHONE_NUMBER
        This field is display only.
Ext. - O_STAFF_PHONES. PHONE_EXTENSION
        This field is display only.
Phone Type - O_STAFF_PHONES.SPT_DESCRIPTION
        Generated from O_STAFF_PHONES.SPT_PHONE_TYPE_CODE
        Code table column S_PHONE_TYPES.PHONE_TYPE_CODE
        This field is display only.

Background Process(es)

The system displays the Phone, Ext. and Phone Type field with values from the Staff Data record based upon the Staff ID selected in the Organizational Units - Contact Info window.

Section 5 - 1.1.2.4 Organizational Units-Phone popup

Fields

Phone Number - O_ORG_UNIT_PHONES.PHONE_NUMBER
        This field is mandatory.
Ext. - O_ORG_UNIT_PHONES.PHONE_EXTENSION
        This field is optional.
Phone Type - S_PHONE_TYPES.DESCRIPTION
        Used to populate O_ORG_UNIT_PHONES.SPT_PHONE_TYPE_CODE
        Code table column S_PHONE_TYPES.PHONE_TYPE_CODE
        Lov : s_phone_types. Lov is used for validation.
        This field is mandatory if the phone number field is filled in.

Background Process(es)

None

Section 5 - 1.1.2.5   Organizational Units-Programs & Outreach Referral Organizations popup

Fields

Code - O_ORG_PROGRAMS.PRG_PROGRAM_ID
       Code table column O_PROGRAMS.PROGRAM_ID
       Lov : o_programs. Lov is used for validation.
       This field is mandatory
Description - O_PROGRAMS.DESCRIPTION Generated from
       O_ORG_PROGRAMS.PRG_PROGRAM_ID
       Code table column O_PROGRAMS.PROGRAM_ID
       This field is display only.
Comment - O_ORG_PROGRAMS.NOTE for O_ORG_PROGRAMS.PRG_PROGRAM_ID
       Code table column O_PROGRAMS.PROGRAM_ID
       This field is optional.
Code - O_OUTREACH_PROGRAMS.OO_OUTREACH_ORG_ID
       Code table column O_OUTREACH_ORGANIZATIONS.OUTREACH_ORG_ID
       for the O_ORG_PROGRAMS.PRG_PROGRAM_ID
       Lov: o_outreach_organizations. Lov is used for validation.
       This field is mandatory.
Outreach Organization - O_OUTREACH_ORGANIZATION.NAME Calculated from
       O_OUTREACH_PROGRAMS.OO_OUTREACH_ORG_ID
       Code table column O_OUTREACH_ORGANIZATIONS.OUTREACH_ORG_ID
       This field is display only.

Background Process(es)

The system populates the Code and Outreach / Referral Organization field with values corresponding to the Code selected under the Program Categories section of this window. The user can also independently select additional Outreach / Referral Organizations by clicking on the list of values button for the Code field under the Outreach / Referral Organization section of the screen.

Allows user to Populate CODE, DESCRIPTION, and COMMENT fields under Program Categories

Allows user to Populate CODE and OUTREACH_REFERRAL_ORGANIZATION fields under Outreach / Referral Organizations.

Section 5 - 1.1.2.6   Organizational Units-Organizational Unit Characteristics

Fields

Appointment Interval – O_ORGANIZATIONAL_UNITS.INTERVAL
        This field is mandatory.
Cross Streets - O_ORGANIZATIONAL_UNITS.CROSS_STREETS
        Default value is N/A.
        This field is mandatory.
Organization Size - O_ORGANIZATIONAL_UNITS.ORG_SIZE.
        Lov: Static (small, medium, and large). Default value is Large.
        This field is mandatory.
Database – O_ORGANIZATIONAL_UNITS.DB_LOCATION.
        Used to populate O_ORGANIZATIONAL_UNITS.DB_LOCATION and
                O_ORGANIZATIONAL_UNITS.DB_LINK
        Lov: Static (PHXAIM, TUCAIM, PLTAIM and Not Applicable). No Default value.
        This field is mandatory when creating Local Agencies.
Comment - O_ORGANIZATIONAL_UNITS.OPERCHAR_NOTES
        This field is optional.
Zip Codes Serviced - O_ORG_UNIT_ZIP.SZ_ZIP5
        Code table column S_ZIPS.ZIP5
        Lov: s_zips. Lov is used for validation.
        This field is mandatory.

Check Box(es)

Print Appointment Notice - O_ORGANIZATIONAL_UNITS.PRINT_APPT_NOTICES
Print Appointment Labels - O_ORGANIZATIONAL_UNITS.PRINT_APPT_LABELS
WIC Clinic - O_ORGANIZATIONAL_UNITS.WIC_CLINIC_FLAG
CSFP Clinic - O_ORGANIZATIONAL_UNITS.CSFP_CLINIC_FLAG
CSFP Distribution Site - O_ORGANIZATIONAL_UNITS.CSFP_DISTRIBUTION_SITE_FLAG
Farmers Market - O_ORGANIZATIONAL_UNITS.FARMERS_MARKET_FLAG

Background Process(es)

The system searches upon the values entered in the Zip Codes Serviced field in the Zip Code Lookup
functionality on the Appointments-Main window in the Appointment Scheduler module.

Allows user to check boxes PRINT_APPOINTMENT_NOTICES,PRINT_APPOINTMENT_LABELS,
WIC_CLINIC, CSFP_CLINIC, and CSFP_DISTRIBUTION_SITE

Allows user to Populate CROSS_STREETS, ORGANIZATION_SIZE, ZIP_CODES_SERVICED,
AND COMMENT fields.

Operations Management

Section 5 - 1.1.3   Update Outreach / Referral Organizations

Section 5 - 1.1.3.1   Outreach / Referral Organizations

Form: os_mtn_outreach_org

Fields

Outreach / Referral Org. ID - O_OUTREACH_ORGANIZATIONS.OUTREACH_ORG_ID
      5 digit system generated number.
      See Background Processes for system generation.
      This field is mandatory.
Name - O_OUTREACH_ORGANIZATIONS. NAME
      This field is mandatory.
Outreach / Referral Org. Type -
      O_OUTREACH_ORGANIZATIONS.OOT_OUTREACH_ORG_TYPE_CODE,
      Code table column O_OUTREACH_ORG_TYPES.OUTREACH_ORG_TYPE_CODE
      Description is O_OUTREACH_ORG_TYPES.DESCRIPTION
      Lov : o_outreach_org_types. Lov is used for validation.
      This field is mandatory.
Address - O_OUTREACH_ORGANIZATIONS.ADDRESS1,
      O_OUTREACH_ORGANIZATIONS.ADDRESS2
      The ADDRESS1 field is mandatory, the ADDRESS2 field is optional.
City - O_OUTREACH_ORGANIZATIONS.SC_DESCRIPTION
      Used to populate O_OUTREACH_ORGANIZATIONS.SGEO_GEO_LOCATION_ID
      Code table column S_GEO_LOCATIONS.GEO_LOCATION_ID
      Lov: s_geo_locations. Lov is used for validation.
      This field is mandatory.
County - S_COUNTIES.DESCRIPTION from S_GEO_LOCATIONS.SC4_COUNTY_CODE
      Generated from O_OUTREACH_ORGANIZATIONS.SGEO_GEO_LOCATION_ID
      Code table column S_GEO_LOCATIONS.GEO_LOCATION_ID
      This field is display only.
State - S_GEO_LOCATIONS.SS_STATE_ID
      Generated from O_OUTREACH_ORGANIZATIONS.SGEO_GEO_LOCATION_ID
      Code table column S_GEO_LOCATIONS.GEO_LOCATION_ID
      This field is display only.
Zip Code - S_GEO_LOCATIONS.SZ_ZIP5, O_OUTREACH_ORGANIZATIONS.ZIP4
      Used to populate O_OUTREACH_ORGANIZATIONS.SGEO_GEO_LOCATION_ID
      Code table column S_GEO_LOCATIONS.GEO_LOCATION_ID
      Lov: s_geo_locations. Lov is used for validation.
      The zip5 field is mandatory, the zip4 field is optional.
Last Name - O_OUTREACH_ORGANIZATIONS.CONTACT_LAST_NAME
      This field is mandatory.
First Name - O_OUTREACH_ORGANIZATIONS.CONTACT_FIRST_NAME
      This field is mandatory.
MI1 - O_OUTREACH_ORGANIZATIONS.CONTACT_MI1
      This field is optional.

MI2 - O_OUTREACH_ORGANIZATIONS.CONTACT_MI2
      This field is optional.
Title - O_OUTREACH_ORGANIZATIONS.SCP_CONTACT_TITLE_CODE
      Code table column S_CONTACT_TITLES.CONTACT_TITLE_CODE
      Description is S_CONTACT_TITLES.DESCRIPTION
      Lov : s_contact_titles. Lov is used for validation.
      This field is mandatory.
Comment - O_OUTREACH_ORGANIZATIONS.NOTE
      This field is optional.

Check Box(es)

Smoking Referral Org. - O_OUTREACH_ORGANIZATIONS.SMOKING_ORG_FLAG

Background Process(es)

Outreach Ref / Org ID field
The Outreach Ref / Org ID field is system generated when the user adds a new Outreach / Referral
Organization. The system first selects the O_ORGANIZATIONAL_UNITS.ORG_CODE for the
O_ORGANIZATIONAL_UNITS.SEQ_ID of the Local Agency the user entered when logging onto the
AIM system.

The system performs a search to determine the next available
O_OUTREACH_ORGANIZATIONS.OUTREACH _ORG_ID, which is stored as a numeric value
consisting of a prefix containing the user entered Local Agency ORG_CODE, (a two digit value) and a
suffix which represents the unique value of the Outreach / Referral organization(a 3 digit value).
This value is stored in the OUTREACH_ORG_SEQ field in the
S_APPL_SEQUENCES base table based on the Agency that the user is logged in to.

Section 5 - 1.1.3.2   Outreach / Referral Organizations – Local Agencies popup

Fields

Local Agency – NAME from O_ORGANIZATIONAL_UNITS used to populate
      O_OUT_ORG_LAS.OU_SEQ_ID. Code table column
      O_ORGANIZATIONAL_UNITS.SEQ_ID
      Lov is used for validation. This field is mandatory.

Check Box(es)

Disabled Flag – O_OUT_ORG_LAS.DISABLED_FLAG

Section 5 - 1.1.3.3   Outreach / Referral Organizations-Communications popup

Fields

Code - O_OUTREACH_COMMS.OTC_OUTREACH_COMM_TYPE_CODE
    Code table column O_OUTREACH_COMM_TYPES.OUTREACH_COMM_TYPE_CODE
    Lov:o_outreach_comm_types. Lov is used for validation.
    This field is mandatory.
Description - O_OUTREACH_COMM_TYPES. DESCRIPTION
    This field is display only.
Date Sent/Called - O_OUTREACH_COMMS.DATE_SENT_CALLED
    This field is mandatory.
Comment - O_OUTREACH_COMMS.NOTE
    This field is optional.

Background Process(es)

None.

Section 5 - 1.1.3.4   Outreach / Referral Organizations-Program Category popup

Fields

ID - O_OUTREACH_PROGRAMS.PRG_PROGRAM_ID
    Lov :o_programs.
    This field is mandatory.
Description - O_PROGRAMS.DESCRIPTION
    This field is display only.
Comment - O_OUTREACH_PROGRAMS.NOTE
    This field is optional.

Background Process(es)

None.

Section 5 - 1.1.3.5   Referral Organizations-Phone popup

Fields

Phone - O_OUTREACH_ORG_PHONES.PHONE_NUMBER
    This field is optional.
Ext. - O_OUTREACH_ORG_PHONES.PHONE_EXTENSION
    This field is optional.
Phone Type - O_OUTREACH_ORG_PHONES.SPT_DESCRIPTION

Used to populate O_OUTREACH_ORG_PHONES.SPT_PHONE_TYPE_CODE
Code table column S_PHONE_TYPES.PHONE_TYPE_CODE
Lov: s_phone_types. Lov is used for validation.
This field is mandatory if a phone number has been filled in the phone field.

Background Process(es)

None.

Section 5 - 1.1.4   Update Programs

Section 5 - 1.1.4.1   Program Categories

Form: os_mtn_program

Field

Code - O_PROGRAMS.PROGRAM_ID
      This field is mandatory.
Description -O_PROGRAMS.DESCRIPTION
      This field is mandatory
Adj Effective Date - O_PROGRAMS.ADJ_EFFECTIVE_DATE
      This field is optional.
End Date - O_PROGRAMS.ADJ_END_DATE
      This field is optional.
Comment - O_PROGRAMS.NOTE
      This field is optional.
Code - O_PROGRAM_FUNDS. FFS_FUND_SOURCE_CODE
      Code table column F_FUND_SOURCES.FUND_SOURCE_CODE
      Lov: f_fund_sources. Lov is used for validation.
      This field is optional.
Description -F_FUND_SOURCES.DESCRIPTION
      This field is display only.

Check Box(es)

Adj. Eligible - O_PROGRAMS.ADJ_ELIGIBLE_FLAG

Family Eligible - O_PROGRAMS.FAMILY_ELIGIBLE_FLAG

Print on Care Plan - O_PROGRAMS.PRINT_ON_CARE_FLAG

Background Process(es)

None.

Operations Management

Section 5 - 1.1.5   Update Time Study - Daily Log

Section 5 - 1.1.5.1   Time Study - Daily Log

Form: os_time_study_daily_log

Fields

Agency - O_ORGANIZATIONAL_UNITS.ORG_CODE
>   This field is display only.
Staff ID - O_STAFF_TIME_STUDIES.SM_STAFF_MEMBER_ID
>   Code table column O_STAFF_MEMBERS.STAFF_MEMBER_ID
>   Lov: o_staff_members. Lov is used for validation.
>   This field is mandatory for users with the S_WIC_USERS.STUDY_SUPERVISOR field = 'Y',
>   otherwise it is display only.
Date - O_STAFF_TIME_STUDIES.TIME_STUDY_DATE
>   This field is mandatory.
Participant Services - O_STAFF_TIME_STUDIES.PART_SERVICES for the
>   O_STAFF_TIME_STUDIES.TIME_STUDY_DATE and
>   O_STAFF_TIME_STUDIES.TIME_SLOT_BEGIN.
>   This field is optional.
Nutrition Education - O_STAFF_TIME_STUDIES.NUTR_ED for the
>   O_STAFF_TIME_STUDIES.TIME_STUDY_DATE and
>   O_STAFF_TIME_STUDIES.TIME_SLOT_BEGIN.
>   This field is optional.
Breastfeeding - O_STAFF_TIME_STUDIES.BREASTFEEDING
>   for the O_STAFF_TIME_STUDIES.TIME_STUDY_DATE and
>   O_STAFF_TIME_STUDIES.TIME_SLOT_BEGIN.
>   This field is optional.
Admin - O_STAFF_TIME_STUDIES.ADMIN for the
>   O_STAFF_TIME_STUDIES.TIME_STUDY_DATE and
>   O_STAFF_TIME_STUDIES.TIME_SLOT_BEGIN.
>   This field is optional.
Farmers Market - O_STAFF_TIME_STUDIES.FARMERS_MKT
>   for the O_STAFF_TIME_STUDIES.TIME_STUDY_DATE and
>   O_STAFF_TIME_STUDIES.TIME_SLOT_BEGIN.
>   This field is optional.
Daily Totals (min) - Totals the sum of each individual column.
>   SUM(O_STAFF_TIME_STUDIES.PART_SERVICES)
>   SUM(O_STAFF_TIME_STUDIES.NUTR.ED)
>   SUM(O_STAFF_TIME_STUDIES.BREASTFEEDING)
>   SUM(O_STAFF_TIME_STUDIES.ADMIN)
>   SUM(O_STAFF_TIME_STUDIES.FARMERS_MKT)
This field is calculated by the system. For each of these database fields, the system calculates a sum of
the total minutes spent on that activity during the day.

Hours (For each column) **-** Calculated from (Daily Totals (min) / 60) rounded to the nearest hour.

This field is calculated by the system. For each field in the database, the system calculates the number of hours spent on that activity during the day by translating the minutes to hours.

Push Buttons

Create Log - Allows user with Time Study Supervisor capability to create and view log information for other staff members in their agency.

Background Process(es)

Rows
The first half of the time slot range is stored in O_STAFF_TIME_STUDIES.TIME_SLOT_BEGIN for each individual record. For example, the first time slot shown on the screen is from 6:00 A.M. to 7:00 A.M. so 6:00 A.M. will be the value stored in O_STAFF_TIME_STUDIES.TIME_SLOT_BEGIN. Upon the user opening the Time Study - Daily Log Form, a When-New-Form-Instance trigger prompts the system to verify if the S_WIC_USERS.STUDY_SUPERVISOR field value for the userid entered on the Arizona - Log on Screen is 'Y' or 'N'. If the value is 'Y' the Staff ID field is mandatory, otherwise it is display only.

Operations Management

Section 5 - 1.1.6   Update Annual WIC Cost Summary

Section 5 - 1.1.6.1   Annual WIC Cost Summary

Form: os_annual_wic_cost_summary

Fields

Local Agency - O_ORGANIZATIONAL_UNITS.ORG_CODE for the
       O_ANNUAL_WIC_COST_SUMMARIES.OU_SEQ_ID
       Code table column O_ORGANIZATIONAL_UNITS.ORG_CODE
       Description is O_ORGANIZATIONAL_UNITS.NAME for the
       O_ANNUAL_WIC_COST_SUMMARIES.OU_SEQ_ID
       Lov: o_organizational_units. Lov is used for validation.
       This field is mandatory.
Fiscal Year - O_ANNUAL_WIC_COST_SUMMARIES.FISCAL_YEAR
       This field is mandatory.
Personnel & ERE - O_ANNUAL_WIC_COST_SUMMARIES.PERSONNEL_ERE
       This field is optional.
       See calculation in background processes below.
Professional & Outside Services -
       O_ANNUAL_WIC_COST_SUMMARIES.PROF_OUTSIDE_SERVICES
       This field is optional.
Travel Costs - O_ANNUAL_WIC_COST_SUMMARIES.TRAVEL_COSTS
       This field is optional.
Occupancy Costs - O_ANNUAL_WIC_COST_SUMMARIES.OCCUPANCY_COSTS
       This field is optional.
Other Operating Costs - O_ANNUAL_WIC_COST_SUMMARIES.OTHER_OPERATING_COSTS
       This field is optional.
Capital Costs - O_ANNUAL_WIC_COST_SUMMARIES.CAPITAL_COSTS
       This field is optional.
Indirect Costs - O_ANNUAL_WIC_COST_SUMMARIES.INDIRECT_COSTS
       This field is optional.
Total - Totals the sum of each row and column. For each column:
       SUM(O_ANNUAL_WIC_COST_SUMMARIES.PERSONNEL_ERE)
       SUM(O_ANNUAL_WIC_COST_SUMMARIES.PROF_OUTSIDE_SERVICES)
       SUM(O_ANNUAL_WIC_COST_SUMMARIES.TRAVEL_COSTS)
       SUM(O_ANNUAL_WIC_COST_SUMMARIES.OCCUPANCY_COSTS)
       SUM(O_ANNUAL_WIC_COST_SUMMARIES.OTHER_OPERATING_COSTS)
       SUM(O_ANNUAL_WIC_COST_SUMMARIES.CAPITAL_COSTS)
       SUM(O_ANNUAL_WIC_COST_SUMMARIES.INDIRECT_COSTS) for each
       O_STAFF_TIME_STUDIES activity.

       For each row: SUM(O_STAFF_TIME_STUDIES.PART_SERVICES)
       SUM(O_STAFF_TIME_STUDIES.NUTR.ED)

SUM(O_STAFF_TIME_STUDIES.BREASTFEEDING)
SUM(O_STAFF_TIME_STUDIES.ADMIN)
SUM(O_STAFF_TIME_STUDIES.FARMERS_MKT) for the particular
O_ANNUAL_WIC_COST_SUMMARIES activity.

The system totals the number of dollars spent on each of the activity categories in that local agency for the
fiscal year shown.

Push Buttons

Create Log - Allows user with Time Study Supervisor capability to create and view log information for other staff members in their agency.

Background Process(es)

Personnel and ERE

When the user selects a Local Agency and Fiscal Year, the system will then populate the Personnel & ERE row with values from the hours spent for the particular activity type(calculated from Daily Totals(min) divided by 60 rounded to the nearest hour) multiplied by O_JOB_DESCRIPTIONS.HOURLY_SALARY multiplied by O_JOB_DESCRIPTIONS.FTE_BASE.

Next, the ERE cost for the particular O_STAFF_TIME_STUDIES activity is calculated by multiplying the result of the calculation above by O_JOB_DESCRIPTIONS.ERE_PERCENT.

The system then adds these two results together for each O_STAFF_MEMBERS.STAFF_MEMBER_ID with the same O_ORGANIZATIONAL_UNITS.ORG_CODE. The system then populates O_ANNUAL_WIC_COST_SUMMARIES.PERSONNEL_ERE by totaling the previous calculation for all staff members in a local agency for the particular O_STAFF_TIME_STUDIES activity.

The system will provide a running total in the Total row at the bottom of the screen which will change as additional cost values are added to the rows above it where:

O_ORGANIZATIONAL_UNITS.OU_TYPE = 'CLINIC'
AND O_ORGANIZATIONAL_UNITS.SEQ_ID
    = NVL(:SGL_CLINIC,O_ORGANIZATIONAL_UNITS.SEQ_ID)
AND O_ORGANIZATIONAL_UNITS.SEQ_ID = O_ORGANIZATIONAL_UNITS.OU_SEQ_ID
ORDER BY O_ORGANIZATIONAL_UNITS.ORG_CODE,
             O_ORGANIZATIONAL_UNITS.ORG_CODE

The running total is shown in the "Total" row and column in the fields listing.

The O_ANNUAL_WIC_COST_SUMMARY.ACTIVITY column in the database will be populated with the activities corresponding to columns in O_STAFF_TIME_STUDY (Client Services, Nutrition Education, Breastfeeding, Admin, Farmers Market).

Operations Management

Section 5 - 2 Tables

Section 5 - 2.1 Update Table Information

Section 5 - 2.1.1 Update Outreach / Referral Organization Types

Section 5 - 2.1.1.1 Maintain Outreach / Referral Organization Types

Form: os_mtn_out_org_type

Report: or_mtn_out_org_type

Fields

Code - O_OUTREACH_ORG_TYPES.OUTREACH_ORG_TYPE_CODE
    This field is mandatory.
Description - O_OUTREACH_ORG_TYPES.DESCRIPTION
    This field is mandatory
Comment - O_OUTREACH_ORG_TYPES.NOTE
    This field is optional.

Background Process(es)

None.

Operations Management

Section 5 - 2.1.2   Update Outreach / Referral Communication Types

Section 5 - 2.1.2.1   Maintain Outreach / Referral Communication Types

Form: os_mtn_outcomm_type

Report: or_mtn_outcomm_type

Fields

Code - O_OUTREACH_COMM_TYPES.OUTREACH_COMM_TYPE_CODE
        This field is mandatory.
Description - O_OUTREACH_COMM_TYPES.DESCRIPTION
        This field is mandatory.
Comment - O_OUTREACH_COMM_TYPES.NOTE
        This field is optional.

Background Process(es)

None.

Operations Management

Section 5 - 2.1.3   Update Staff Titles

Section 5 - 2.1.3.1   Maintain Staff Titles

Forms: os_mtn_staff_title

Report: or_mtn_staff_title

Fields

Code - O_STAFF_TITLES.STAFF_TITLE_CODE
        This field is mandatory.
Description - O_STAFF_TITLES.DESCRIPTION
        This field is mandatory.
Title Category - O_STAFF_TITLES.TC_TITLE_ CATEGORY_CODE
        Code table column O_TITLE_CATEGORIES.TITLE_CATEGORY_CODE
        Description is O_TITLE_CATEGORIES.DESCRIPTION
        Lov: o_title_categories. Lov is used for validation.
        This field is mandatory.
Comment - O_STAFF_TITLES.NOTE
        This field is optional.

Background Process(es)

The system populates the category field with the description corresponding to the Title selected where:

O_TITLE_CATEGORIES.TITLE_CATEGORY_CODE =
    O_STAFF_TITLES .TC_TITLE_CATEGORY_CODE

ORDER BY O_STAFF_TITLES .STAFF_TITLE_CODE

Operations Management

Section 5 - 2.1.4   Update Title Categories

Section 5 - 2.1.4.1   Maintain Title Categories

Form: os_mtn_title_cat

Report: or_mtn_title_cat

Fields

Code - O_TITLE_CATEGORIES.TITLE_CATEGORY_CODE
        This field is mandatory.
Description - O_TITLE_CATEGORIES.DESCRIPTION
        This field is mandatory.
Comment - O_TITLE_CATEGORIES.NOTE
        This field is optional.

Background Process(es)

None.

Operations Management

Section 5 - 3 Outputs

Section 5 - 3.1 Labels

Section 5 - 3.1.1 Creating Outreach / Referral Organization Mailing Labels

Section 5 - 3.1.1.1 Outreach / Referral Organization Labels Parameter

Form: os_org_label
Report: or_ou_labels_5160, or_ou_labels_5163

Fields

Label – Label type: "5160: Avery HP Label Stock (3x10) (1" x 2 5/8")" or "5163: Avery HP Label
        Stock (2x5) (2" x 4")"
        Default = None.
Select By - Enables the user to select the search criterion the report will query by:
        Local Agency, Outreach Organization, or Outreach Type.
        Default = None.
Local Agency – Displays O_ORGANIZATIONAL_UNITS.NAME
        Lov: O_ORGANIZATIONAL_UNITS.NAME. Lov is used for validation.
        Default = None.
Outreach Organization – Displays O_OUTREACH_ORGANIZATIONS.NAME.
        Lov: o_outreach_organizations. Lov is used for validation.
        Default = None.
Outreach Type - Displays O_OUTREACH_ORG_TYPES.DESCRIPTION
        Lov: o_outreach_org_types. Lov is used for validation.

Section 5 - 3.1.1.2   Outreach / Referral Organization Labels Report

Fields

Outreach Organization Name - O_OUTREACH_ORGANIZATIONS.NAME
Outreach Organization Address 1 - O_OUTREACH_ORGANIZATIONS.ADDRESS1
Outreach Organization Address 2 - O_OUTREACH_ORGANIZATIONS.ADDRESS2
City - S_GEO_LOCATIONS.SC_DESCRIPTION
State - S_GEO_LOCATIONS.SS_STATE_ID
Zip - S_GEO_LOCATIONS.SZ_ZIP5
Zip4 - O_OUTREACH_ORGANIZATIONS.ZIP4
Contact Last Name - O_OUTREACH_ORGANIZATIONS.CONTACT_LAST_NAME
Contact First Name - O_OUTREACH_ORGANIZATIONS.CONTACT_FIRST_NAME

Sort Criteria (Major to Minor):

Outreach / Referral Organization Name (Ascending Order)

Background Process(es)

User selects Local Agency:

```
select ooo.outreach_org_id, ooo.name, ooo.address1, ooo.address2,
       ooo.sgeo_geo_location_id, ooo.zip4,
       ooo.contact_first_name || ' ' || ooo.contact_last_name
   from o_outreach_organizations ooo, o_out_org_las oool
   where ooo.outreach_org_id = oool.oo_outreach_org_id
   and oool.ou_seq_id = :srch.org_id;
```

User selects Outreach Org:

```
select outreach_org_id, name, address1, address2, sgeo_geo_location_id, zip4,
       contact_first_name || ' ' || contact_last_name
   from o_outreach_organizations
   where outreach_org_id = :srch.outreach_id;
```

User selects Outreach Type:

```
select outreach_org_id, name, address1, address2, sgeo_geo_location_id, zip4,
       contact_first_name || ' ' || contact_last_name
   from o_outreach_organizations
   where oot_outreach_org_type_code = :srch.out_type;
```

Operations Management

Section 5 - 3.1.2   Creating Agency Mailing Labels

Section 5 - 3.1.2.1   Agency Labels Parameter

Form: os_ou_label
Reports: or_ou_labels_5160, or_ou_labels_5163

Fields

Label – Label type: "5160: Avery HP Label Stock (3x10) (1" x 2 5/8")" or "5163: Avery HP Label
        Stock (2x5) (2" x 4")"
        Default = None.
Local Agency – Displays O_ORGANIZATIONAL_UNITS.NAME
        Lov: O_ORGANIZATIONAL_UNITS.NAME. Lov is used for validation.
        Default = None.

Section 5 - 1.1.1.1 Agency Labels Report

Fields

Name - O_ORGANIZATIONAL_UNITS.NAME
Address1 - O_ORGANIZATIONAL_UNITS.ADDRESS1
Address2 - O_ORGANIZATIONAL_UNITS.ADDRESS2
City - S_GEO_LOCATIONS.SC_DESCRIPTION
State - S_GEO_LOCATIONS_SS_STATE_ID
Zip5 - S_GEO_LOCATIONS.SZ_ZIP5
Zip4 - O_ORGANIZATIONAL_UNITS.ZIP4
First Name - O_STAFF_MEMBERS.FIRST_NAME
Last Name - O_STAFF_MEMBERS.LAST_NAME

Sort Criteria (Major to Minor):

Organizational Unit (Ascending)

Background Process(es)

The system allows the user to select the Organizational Unit based upon the Local Agency the user
logged into when entering the AIM application. Users entering the State Agency as their Agency code
will have access to all agencies in the AIM application.

S_GEO_LOCATIONS.GEO_LOCATION_ID =
    O_ORGANIZATIONAL_UNITS.SGEO_GEO_LOCATION_ID

AND   O_STAFF_MEMBERS.STAFF_MEMBER_ID =
    O_ORGANIZATIONAL_UNITS.SM_STAFF_MEMBER_ID

AND   O_ORGANIZATIONAL_UNITS.OU_TYPE = 'LOCALAGY'

The system displays the zip code information where:
    S_GEO_LOCATIONS.GEO_LOCATION_ID =
                        O_ORGANIZATIONAL_UNITS.SGEO_GEO_LOCATION_ID
    AND   S_STAFF_MEMBERS.STAFF_MEMBER_ID =
O_ORGANIZATIONAL_UNITS.SM_STAFF_MEMBER_ID
    AND   O_ORGANIZATIONAL_UNITS.OU_TYPE = 'LOCALAGY'

Operations Management

Section 5 - 3.2   Reports

Section 5 - 3.2.1   Producing a Local Agency Directory

Section 5 - 3.2.1.1   Local Agency Directory Parameter

Report: or_lclagcy_directory

Fields

Internal / External - Allows the user to select whether the generated report will be used for Internal (WIC, CSFP) distribution or External distribution. The user is able to select: Internal or External from a preprogrammed domain of values.

Section 5 - 3.2.1.2   Local Agency Directory Internal & External Reports

Fields

Local Agency and Coordinator Section (Internal & External Reports)

Local Agency - O_ORGANIZATIONAL_UNITS. ORG_CODE
Local Agency Name - O_ORGANIZATIONAL_UNITS.NAME
Coordinator Last Name - O_STAFF_MEMBERS.LAST_NAME for the
          O_STAFF_MEMBERS.LA_WIC_COORD_FLAG = 'Y'
Coordinator First Name -O_STAFF_MEMBERS.FIRST_NAME for the
          O_STAFF_MEMBERS.LA_WIC_COORD_FLAG = 'Y'
Address 1 - O_ORGANIZATIONAL_UNITS.ADDRESS1
Address 2 -O_ORGANIZATIONAL_UNITS.ADDRESS2
City - S_GEO_LOCATIONS.SC_DESCRIPTION
State -S_GEO_LOCATIONS.SS_STATE_ID
Zip5 -S_GEO_LOCATIONS.SZ_ZIP5
Zip4 - O_ORGANIZATIONAL_UNITS.ZIP4
Phone - O_ORG_UNIT_PHONES.PHONE_NUMBER
Fax - O_ORG_UNIT_PHONES.PHONE_NUMBER
          This system differentiates between phone and fax numbers by the
          S_PHONE_TYPES.PHONE_TYPE_CODE which is a field in the O_STAFF_PHONES,
          O_OUTREACH_ORG_PHONES and O_ORG_UNIT_PHONES tables.
Email - O_ORGANIZATIONAL_UNITS.E_MAIL
Days & Hours of Operation - A_OPERATION_HOURS.DAY_OF_WEEK
          A_OPERATION_HOURS.HOURS_OPEN
          A_OPERATION_HOURS.HOURS_CLOSE

Clinics Section

Code - O_ORGANIZATIONAL_UNITS.ORG_CODE
Clinic - O_ORGANIZATIONAL_UNITS.NAME
Contact Last Name - O_STAFF_MEMBERS.LAST_NAME
Contact First Name - O_STAFF_MEMBERS.FIRST_NAME
Address 1 - O_ORGANIZATIONAL_UNITS.ADDRESS1
Address 2 - O_ORGANIZATIONAL_UNITS.ADDRESS2
City -S_GEO_LOCATIONS.SC_DESCRIPTION
State - S_GEO_LOCATIONS.SS_STATE_ID
Zip5 - S_GEO_LOCATIONS.SZ_ZIP5
Zip4 - O_ORGANIZATIONAL_UNITS.ZIP4
Phone - (Internal Only)O_ORG_UNIT_PHONES.PHONE_NUMBER
Fax - (Internal Only)O_ORG_UNIT_PHONES.PHONE_NUMBER
       This system differentiates between phone and fax numbers by the
       S_PHONE_TYPES.PHONE_TYPE_CODE which is a field in the O_STAFF_PHONES,
       O_OUTREACH_ORG_PHONES and O_ORG_UNIT_PHONES tables.
Email - (Internal Only)O_ORGANIZATIONAL_UNITS.EMAIL
Days & Hours of Operation - A_OPERATION_HOURS.DAY_OF_WEEK
       A_OPERATION_HOURS.HOURS_OPEN
       A_OPERATION_HOURS.HOURS_CLOSE
Contact Name - (Internal Only)
       O_STAFF_MEMBERS.LAST_NAME
       O_STAFF_MEMBERS.FIRST_NAME

Sort Criteria (Major to Minor):

Organizational Unit Code (Ascending)

Background Process(es)

None.

Operations Management

Section 5 - 3.2.2   Producing a Local Agency Staff Listing

Section 5 - 3.2.2.1   Local Agency Staff Listing Parameter

Report: or_la_staff_listing

Fields

Program Category - Queries against O_PROGRAMS.DESCRIPTION
            Lov: o_programs. Lov is used for validation.
            Default = "All"
Sort Sequence - Allows the user to select how the report will be sorted.
            Lov: Static (staff title, category, and name)

Section 5 - 3.2.2.2   Local Agency Staff Listing Report

Fields

Program - O_PROGRAMS.PROGRAM_ID
            O_PROGRAMS.DESCRIPTION
LA ID - O_ORGANIZATIONAL_UNITS.ORG_CODE
LA Name - O_ORGANIZATIONAL_UNITS.NAME
Name (Last and First) - O_STAFF_MEMBERS.LAST_NAME||'
            '||O_STAFF_MEMBERS.FIRST_NAME||' '||O_STAFF_MEMBERS.MI1
Title Category - O_TITLE_CATEGORIES.DESCRIPTION
Title - O_STAFF_TITLES.DESCRIPTION
Program Funding - F_FUND_SOURCES.DESCRIPTION
FT/PT COOP - DECODE(SIGN(O_JOB_DESCRIPTIONS.WEEKLY_HOURS -
            O_JOB_DESCRIPTIONS.FTE_BASE),-1,'PT','FT') FT_OR_PT
Hrs/Week - O_JOB_DESCRIPTIONS.WEEKLY_HOURS
FTE's - Calculated from O_JOB_DESCRIPTIONS.WEEKLY_HOURS divided by
            O_JOB_DESCRIPTIONS.FTE_BASE
Address - O_ORGANIZATIONAL_UNITS.ADDRESS1
            O_ORGANIZATIONAL_UNITS.ADDRESS2
            S_GEO_LOCATIONS.SC_DESCRIPTION
            S_GEO_LOCATIONS.SS_STATE_ID
            S_GEO_LOCATIONS.SZ_ZIP5
            O_ORGANIZATIONAL_UNITS.ZIP4
Phone - O_ORG_UNIT_PHONES.PHONE_NUMBER

Fax - O_ORG_UNIT_PHONES.PHONE_NUMBER
            This system differentiates between phone and fax numbers by the
            S_PHONE_TYPES.PHONE_TYPE_CODE which is a field in the O_STAFF_PHONES,

O_OUTREACH_ORG_PHONES and O_ORG_UNIT_PHONES tables.

Local Agency Coordinator - O_STAFF_MEMBERS.FIRST_NAME
O_STAFF_MEMBERS.LAST_NAME for the
O_STAFF_MEMBERS.LA_WIC_COORD_FLAG = 'Y'

Total FTE's - SUM(O_JOB_DESCRIPTIONS.WEEKLY_HOURS divided by
O_JOB_DESCRIPTIONS.FTE_BASE) for each agency.

Sort Criteria (Major to Minor):

Program Category Code (Ascending), then depending upon user selection for the sort:

Three Sort Criteria (Major to Minor):

Staff Title: Organizational Unit Name, Staff Title Description, Staff Member Last Name, Staff Member First Name

Title Category: Organizational Unit Name, Title Category Description, Staff Member Last Name, Staff Member First Name

Staff Name: Organizational Unit Name, Staff Member Last Name, Staff Member First Name

Background Process(es)

None.

Operations Management

Section 5 - 3.2.3   Producing an Outreach / Referral Organization Listing

Section 5 - 3.2.3.1   Outreach / Referral Organization Listing Parameter

Report: or_outorg_listing

Fields

None.

Section 5 - 3.2.3.2   Outreach / Referral Organization Listing Report

Fields

Local / State Agency - O_ORGANIZATIONAL_UNITS.ORG_CODE
Local / State Agency Name - O_ORGANIZATIONAL_UNITS.NAME
Outreach ID - O_OUTREACH_ORGANIZATIONS.OUTREACH_ORG_ID
Name - O_OUTREACH_ORGANIZATIONS.NAME
Address1 - O_OUTREACH_ORGANIZATIONS ADDRESS1
Address2 - O_OUTREACH_ORGANIZATIONS ADDRESS2
City - S_GEO_LOCATIONS.SC_DESCRIPTION
State - S_GEO_LOCATIONS.SS_STATE_ID
Zip5 - S_GEO_LOCATIONS.SZ_ZIP5
Zip4 - O_OUTREACH_ORGANIZATIONS.ZIP4
Contact Last Name - O_OUTREACH_ORGANIZATIONS.CONTACT_LAST_NAME
Contact First Name - O_OUTREACH_ORGANIZATIONS.CONTACT_FIRST_NAME
Description - S_CONTACT_TITLES.DESCRIPTION
Phone - O_OUTREACH_ORG_PHONES.PHONE_NUMBER
        O_OUTREACH_ORG_PHONES.PHONE_EXTENSION
Fax - O_OUTREACH_ORG_PHONES.PHONE_NUMBER
        O_OUTREACH_ORG_PHONES.PHONE_EXTENSION
        This system differentiates between phone and fax numbers by the
        S_PHONE_TYPES.PHONE_TYPE_CODE which is a field in the O_STAFF_PHONES,
        O_OUTREACH_ORG_PHONES and O_ORG_UNIT_PHONES tables.
Organization Type - O_OUTREACH_ORG_TYPES.DESCRIPTION
Program ID - O_PROGRAMS.PROGRAM_ID
Name - O_PROGRAMS.DESCRIPTION
Communication ID - O_OUTREACH_COMM_TYPES.OUTREACH_COMM_TYPE_CODE
Name - O_OUTREACH_COMM_TYPES.DESCRIPTION
Date Sent/Called - O_OUTREACH_COMMS.DATE_SENT_CALLED,

Sort Criteria (Major to Minor):

Outreach / Referral Organization ID (Ascending)
Program Code (Ascending)
Outreach / Referral Communications Date Sent/Called (Ascending)

Background Process(es)

None.

Operations Management

Section 5 - 3.2.4   Producing Nutrition Education Contacts Report

Section 5 - 3.2.4.1   Nutrition Education Contacts Parameter

Report: or_nutr_ed_contacts

Fields

Reporting Level - Allows the user to select the detail level of the report:
> Lov: Static (Summary Only, or Summary and Detail).

From Date -Queries against C_CLIENT_SERVICES.SERVICE_DATE
> Format: MM/DD/YYYY
> This field is mandatory.

Thru Date -   Queries against C_CLIENT_SERVICES.SERVICE_DATE
> Format: MM/DD/YYYY
> This field is mandatory.

Section 5 - 3.2.4.2   Nutrition Education Contacts Summary / Summary & Detail Report

Fields

Local Agency / State Agency - O_ORGANIZATIONAL_UNITS.ORG_CODE
> O_ORGANIZATIONAL_UNITS.NAME

Service - A_SERVICES.DESCRIPTION

Nutrition Education Topic - C_NUTR_ED_TOPICS.DESCRIPTION

Attendees - SUM(C_CLIENT_SERVICES.ATS_ATTEND_STATUS_CODE = 'K') for each
> Nutrition Education Topic within the service.

Missed - SUM(C_CLIENT_SERVICES.ATS_ATTEND_STATUS_CODE = 'M') for each Nutrition
> Education Topic within the service.

Pending - SUM(C_CLIENT_SERVICES.ATS_ATTEND_STATUS_CODE = 'P') for each Nutrition
> Education Topic within the service.

Total for Service - SUM (Attendees, Missed, Pending) for the service.
Attendees(total for service) - SUM (Attendees) for the service.
Missed(total for service) - SUM (Missed) for the service.
Pending(total for service) - SUM (Pending) for the service.

Attendees(local agency totals) - SUM (Attendees(total for service)) for the Local Agency.
Missed(local agency totals) - SUM (Missed(total for service)) for the Local Agency.
Pending(local agency totals) - SUM (Pending(total for service)) for the Local Agency.

Attendees(state agency totals) - SUM (Attendees(total for service)) for the State Agency.
Missed(state agency totals) - SUM (Missed(total for service)) for the State Agency.

Pending(state agency totals) - SUM (Pending(total for service)) for the State Agency.

Sort Criteria (Major to Minor):
Organizational Unit ID (Ascending)
Service ID (Ascending)
Nutrition Education Topic Description (Ascending)

Background Process(es)

The system displays the State Totals Report first when the Summary and Detail reporting level is selected where:

seq_id = :agency

ORDER BY org_code

Operations Management

Section 5 - 3.2.5   Producing a Nutrition Education Monitoring Report

Section 5 - 3.2.5.1   Nutrition Education Monitoring Parameter

Report: or_nutr_ed_monitor

Fields

Local Agency - Queries against O_ORGANIZATIONAL_UNITS.NAME for the Local Agencies.
        Lov: o_organizational_units. Lov is used for validation.
        Defaults to "All Agencies"
Clinic - Queries against O_ORGANIZATIONS_UNITS.NAME for the clinics.
        Lov: o_organizational_units. Lov is used for validation.
        Defaults to "All Clinics"
Dates From - Queries against C_CLIENTS.CLIENT_ID with
        C_CERTIFICATIONS.CERT_END_DATE.
        Format: MM/DD/YYYY
        This field is mandatory.
        See Background Processes.
Thru - Queries against C_CLIENTS.CLIENT_ID with
        C_CERTIFICATIONS.CERT_END_DATE.
        Format: MM/DD/YYYY
        This field is mandatory.
        See Background Processes.

Section 5 - 3.2.5.2   Nutrition Education Monitoring Report

Fields

Dates From - Displays the user entered start date.
Thru - Displays the user entered end date.
Local Agency - O_ORGANIZATIONAL_UNITS.ORG_CODE,
Local Agency Name - O_ORGANIZATIONAL_UNITS.NAME
Clinic - O_ORGANIZATIONAL_UNITS.ORG_CODE
        O_ORGANIZATIONAL_UNITS.NAME
Participant ID - C_CLIENTS.CLIENT_ID for participants whose
        C_CERTIFICATIONS.END_DATE is within the date range entered by the user,
        C_CLIENTS.REC_STATUS equals 'I', and for each CLIENT_ID the
        I_FOOD_INSTRUMENTS.FIRST_DATE_TO_USE must contain a record for
        each of the six months during the CLIENT_ID certification period.
Name - C_CLIENTS.LAST_NAME
        C_CLIENTS.FIRST_NAME
# of Nutrition Ed. Contacts - COUNT (A_APPOINTMENTS.SEQ_ID) for the participant whose
        C_CERTIFICATIONS.CERT_END_DATE is within the user entered date range,

C_CLIENTS.REC_STATUS equals 'I' for each CLIENT_ID, the
I_FOOD_INSTRUMENTS.FIRST_DATE_TO_USE must contain a record for each of the
six months during the CLIENT_ID certification period, the
A_SERVICES.NUTR_ED_FLAG must equal 'Y' for the
C_CLIENT_SERVICES.SRV_SERVICE_CODE, and the
A_APPOINTMENTS.AAS_ATTEND_STATUS_CODE is equal to 'K'(kept) for the
C_CLIENT_SERVICES.SRV_SERVICE_CODE

Sort Criteria (Major to Minor):

Organizational Unit ID (Ascending)
# of Nutrition Ed. Contacts (Descending)
Participant Last Name (Ascending)
Participant First Name (Ascending)

Background Process(es)

Dates From and Thru
Queries against the C_CLIENTS.CLIENT_ID's C_CERTIFICATION.CERT_END_DATE between the
user entered Dates From and Thru fields where the C_CLIENTS.REC_STATUS is equal to 'I' (inactive)
for the C_CLIENTS.CLIENT_ID, and for each CLIENT_ID, the
I_FOOD_INSTRUMENTS.FIRST_DATE_TO_USE must contain a record for each of the six months
during the CLIENT_ID certification period.

Operations Management

Section 5 - 3.2.6   Producing a FNS 648 Local Agency Directory

Section 5 - 3.2.6.1   FNS 648 Local Agency Directory Parameter

Report: or_la_directory

Fields

Type of Report - Allows the user to select the type of report to be sent to the FNS.
          Lov: Static (Addition, Update, and Deletion).
Effective Date - The date that the addition, update or deletion of the Local Agency Directory
          Information is to become effective. This field is user entered.
Organization ID/Level - Queries against O_ORGANIZATIONAL_UNITS.NAME
          O_ORGANIZATIONAL_UNITS.OU_TYPE
          Lov: o_organizational_units. Lov is used for validation..

Section 5 - 3.2.6.2   FNS 648 Local Agency Directory Report

Fields

Type of Report - Calculated from the type of report selected by the user in the parameter field.
Effective Date - Calculated from the month and year of the Effective Date selected by the user in
          the parameter field.
State - F_CONTROLS.STATE_DESC
10-DigitCode - F_CONTROLS.STATE_ID_NUMBER
Local Agency Name - O_ORGANIZATIONAL_UNITS.NAME
Address - O_ORGANIZATIONAL_UNITS.ADDRESS1
City - S_CITIES.DESCRIPTION
State - S_GEO_LOCATION.SS_STATE_ID
Zip Code - S_GEO_LOCATIONS.SZ_ZIPS
Telephone No. - O_ORG_UNIT_PHONES.PHONE_NUMBER

Sort Criteria (Major to Minor):

Not Applicable

Background Process(es)

None.

Operations Management

Section 5 - 3.2.7   Producing a To/From WIC Referrals Report

Section 5 - 3.2.7.1   To / From WIC Referrals Parameter

Report: or_to_from_wic_ref

Fields

Reporting Level - Queries against O_ORGANIZATIONAL_UNITS.NAME.
               Lov: o_organizational_units.
               Lov is used for validation.
               Default = "All Agencies"
Referral Month From - Queries against C_CLIENT_REFERRALS.REFERRAL_DATE
               This field is mandatory.
Thru -Queries against C_CLIENT_REFERRALS.REFERRAL_DATE
               This field is mandatory.

Section 5 - 3.2.7.2   To / From WIC Referrals Report

Fields

Time Period - Calculated from the Referral Month From and Thru fields on the parameter screen.
Local Agency - O_ORGANIZATIONAL_UNITS.NAME
Outreach / Ref. Org. Type -
               O_OUTREACH_ORGANIZATIONS.OOT_OUTREACH_ORG_TYPE_CODE
Outreach / Ref. Org. Name - O_OUTREACH_ORGANIZATIONS.NAME
Referrals From - COUNT(C_FAM_REFERRALS.CFEU_FAMILY_ID) for the specified date range.
% of Total - Referrals From divided by total # of referrals (Referrals From plus Referrals To) multiplied
               by 100.
Referrals To - COUNT(C_CLIENT_REFERRALS.CC_CLIENT_ID)for the specified date range.
% of Total - Referrals To divided by total # of referrals (Referrals From plus Referrals To) multiplied
               by 100.
Total - Records the total sum for the Referrals From, % of Total, Referrals To and % of Total columns.

Sort Criteria (Major to Minor):

Organizational Unit (Ascending)
Outreach / Referral Organization Type (Ascending)
Outreach / Referral Organization ID (Ascending)

Background Process(es)
None.

Operations Management

Section 5 - 3.2.8   Producing a Food Instrument Usage Report

Section 5 - 3.2.8.1   Food Instrument Usage Parameter

Report: fr_food_inst_usage

Fields

See report with same name in Finance Section 3-7.2.6.

Section 5 - 3.2.8.2   Food Instrument Usage Detail and Summary Report

Fields

See report with same name in Finance Section 3-7.2.6.

Section 5 - 3.2.8.3   Food Instrument Usage Summary Report

Fields

See report with same name in Finance Section 3-7.2.6.

Sort Criteria (Major to Minor):

Food Instrument Disposition (Ascending)

Background Process(es)

None.

Operations Management

Section 5 - 3.2.9   Producing a Participant Status Report

Section 5 - 3.2.9.1   WIC Participant Status Parameter

Report: fr_part_status

Fields

See Report with same name in Finance DTSD section 3-7.1.5

Section 5 - 3.2.9.2   WIC Participant Status Report

Fields

See Report with same name in Finance DTSD section 3-7.1.5

Sort Criteria (Major to Minor):
> (Part 1) Organizational Unit Code (Ascending)
> (Part 2) Client ID (Ascending)
> (Part 3) Termination Reason Description (Ascending)

Background Processes:

None.

Section 5 - 3.2.9.3   CSF Participant Status Parameter

Report: fr_csf_part_status

Fields

See Report with same name in Finance DTSD section 3-7.1.5

Section 5 - 3.2.9.4   CSF Participant Status Report

Fields

See Report with same name in Finance DTSD section 3-7.1.5

Background Processes:

None.

Operations Management

Section 5 - 3.2.10 Producing a Time Study Summary Report

Section 5 - 3.2.10.1 Time Study Summary Parameter

Report: or_time_study_smry

Fields

Local Agency - Queries against O_ORGANIZATIONAL_UNITS.NAME.
               Lov: o_organizational_units. Lov is used for validation.
               Default = "All Agencies"
Clinic - Queries against O_ORGANIZATIONAL_UNITS.NAME.
               Lov: o_organizational_units. Lov is used for validation.
               Default = "All Clinics"
Staff - Queries against O_STAFF_MEMBERS.LAST_NAME,
               O_STAFF_MEMBERS.FIRST_NAME,
               O_STAFF_MEMBERS.MI1,
               O_STAFF_MEMBERS.MI2 ,
               Lov: o_staff_members. Lov is used for validation.
               Default = "All Staff"
Fiscal Year - Queries against O_STAFF_TIME_STUDIES.TIME_STUDY_DATE returning the four
               digit year portion of the date in format 'YYYY'**.**

Section 5 - 3.2.10.2 Time Study Summary Report

Fields

Local Agency - O_ORGANIZATIONS_UNITS.ORG_CODE
               O_ORGANIZATIONAL_UNITS.NAME
Clinic - O_ORGANIZATIONS_UNITS.ORG_CODE
               O_ORGANIZATIONAL_UNITS.NAME
Fiscal Year - Calculated from the Fiscal Year parameter field.
Employee Name - O_STAFF_MEMBERS_LAST_NAME
               O_STAFF_MEMBERS_FIRST_NAME
WIC Position / Title - O_STAFF_TITLES_DESCRIPTION for
               O_STAFF_MEMBERS.JD_ST_STAFF_TITLE_CODE
Date - O_STAFF_TIME_STUDIES.TIME_STUDY_DATE
Part. Services - SUM(O_STAFF_TIME_STUDIES.PART_SERVICES) / 60
Nutrition Education - SUM(O_STAFF_TIME_STUDIES.NUTR_ED) / 60
Breast feeding - SUM(O_STAFF_TIME_STUDIES.BREASTFEEDING) / 60
Administration - SUM(O_STAFF_TIME_STUDIES.ADMIN) / 60
Immunization - SUM(O_STAFF_TIME_STUDIES.IMMUNIZATION) / 60
CSFP - SUM(O_STAFF_TIME_STUDIES.CSFP) / 60
Tobacco - SUM(O_STAFF_TIME_STUDIES.TOBACCO) / 60
Other - SUM(O_STAFF_TIME_STUDIES.OTHER) / 60

Monthy Totals - SUM(# OF HOURS SPENT ON EACH WIC ACTIVITY)

Sort Criteria (Major to Minor):

Organizational Unit (Ascending)
Staff Member Last Name (Ascending)
Staff Member First Name (Ascending)
Calendar Date (Ascending)

Background Process(es)

None.

Operations Management

Section 5 - 3.2.11 Producing a Personnel Costs Summary Report

Section 5 - 3.2.11.1 Personnel Costs Summary Parameter

Report: or_persnl_costs_smry

Fields

Local Agency - Queries against O_ORGANIZATIONAL_UNITS.NAME.
        Lov: o_organizational_units. Lov is used for validation.
        Default = "All Agencies"
Clinic - Queries against O_ORGANIZATIONAL_UNITS.NAME.
        Lov: o_organizational_units. Lov is used for validation.
        Default = "All Clinics"
Report Type - Queries against the O_STAFF_TIME_STUDIES table enabling the user to select which
        service to choose for the report.
        Lov: Static (Participant Services, Nutrition Education, Breastfeeding, Administration,
        Immunization, CSFP, Tobacco or Other).
Dates From - Queries against O_STAFF_TIME_STUDIES.TIME_STUDY_DATE
Thru - Queries against O_STAFF_TIME_STUDIES.TIME_STUDY_DATE

Section 5 - 3.2.11.2 Personnel Costs Summary Report

Fields

From - Dates with format MM/DD/YYYY
Thru - Dates with format MM/DD/YYYY
Local Agency - O_ORGANIZATIONAL_UNITS.ORG_CODE
        Name is O_ORGANIZATIONAL_UNITS.NAME
Clinic - O_ORGANIZATIONAL_UNITS.ORG_CODE
        Name is O_ORGANIZATIONAL_UNITS.NAME
Date - Dates with format MM/DD/YY
Name of Employee - O_STAFF_MEMBERS.LAST_NAME
        O_STAFF_MEMBERS.FIRST_NAME
WIC Position - O_STAFF_MEMBERS.ED_PROF_TITLES
Hours Worked in WIC - SUM(O_STAFF_TIME_STUDY.PART_SERVICES,
        O_STAFF_TIME_STUDY.NUTR_ED,
        O_STAFF_TIME_STUDY.BREAST_FEEDING,
        O_STAFF_TIME_STUDY.ADMIN) / 60
Hours Spent on XXXXXXX - COUNT(O_STAFF_TIME_STUDY.XXXXXXX where XXXXXXXX is
        the Report Type.
Percent of WIC Time on XXXXXX - (Hours spent on XXXXXXX / Hours worked in WIC) X 100
Gross Annual Salary Plus Benefits With WIC $ - SUM(Total Salary(Hourly Salary x 2080 hrs/yr x
        FTE) + (Total Salary x ERE%))
Annual Empl Cost for XXXXXXX - (% of WIC Time on 'XXXXX') x (Gross Annual Salary + WIC $

benefits)
Total - SUM(Hours worked in WIC) for all employees (Name of Employee).
        SUM(Hours Spent on XXXXX) for all employees (Name of Employee).
        SUM(Percent of WIC Time on XXXXX) for all employees (Name of Employee).
        SUM(Gross Annual Salary Plus Benefits With WIC $) for all employees (Name of Employee).
        SUM(Annual Empl Cost for XXXXXX) for all employees (Name of Employee).

Sort Criteria (Major to Minor):

Organizational Unit (Ascending)
Calendar Date (Ascending)
Staff Member Last Name (Ascending)
Staff Member First Name (Ascending)

Background Process(es)

None.

Operations Management

Section 5 - 3.2.12 Producing an Annual WIC Cost Summary Sheet

Section 5 - 3.2.12.1 Annual WIC Cost Summary Sheet Parameter

Report: or_ann_wic_costs_smry

Fields

Local Agency - Clicking on the list of values allows the user to select whether to report on a single or all
                Local Agencies. For more information, please refer to the Organizational Units window.
                Queries O_ORGANIZATIONAL_UNITS.NAME
                Lov: o_organizational_units. Lov is used for validation.
                Defaults to 'All Agencies'.
Fiscal Year - Four digit user entered year for which to generate the report.

Section 5 - 3.2.12.2 Annual WIC Cost Summary Sheet Report

Fields

Local Agency - O_ORGANIZATIONAL_UNITS.ORG_CODE
                Name is O_ORGANIZATIONAL_UNITS.NAME
Fiscal Year - The four digit user entered year for which the report is generated with format YYYY,
                stored in O_ANNUAL_WIC_COST_SUMMARIES.FISCAL_YEAR.
Personnel & ERE - (O_ANNUAL_WIC_COST_SUMMARIES.PERSONNEL_ERE) for all records
                with O_ANNUAL_WIC_COST_SUMMARIES.FISCAL_YEAR equal to the user
                selected fiscal year and O_ORGANIZATIONAL_UNITS.ORG_CODE equal to the
                user selected Local Agency for each O_STAFF_TIME_STUDIES service.
Professional & Outside Services -
                SUM(O_ANNUAL_WIC_COST_SUMMARIES.PROF_OUTSIDE_SERVICES) for
                all records with O_ANNUAL_WIC_COST_SUMMARIES.FISCAL_YEAR equal to
                the user selected fiscal year and O_ORGANIZATIONAL_UNITS.ORG_CODE equal
                to the user selected Local Agency for each O_STAFF_TIME_STUDIES service.
Travel Costs - SUM(O_ANNUAL_WIC_COST_SUMMARIES.TRAVEL_COSTS) for all records
                with O_ANNUAL_WIC_COST_SUMMARIES.FISCAL_YEAR equal to the user
                selected fiscal year and O_ORGANIZATIONAL_UNITS.ORG_CODE equal to the
                user selected Local Agency for each O_STAFF_TIME_STUDIES service.
Occupancy Costs - SUM(O_ANNUAL_WIC_COST_SUMMARIES.OCCUPANCY_COSTS) for all
                records with O_ANNUAL_WIC_COST_SUMMARIES.FISCAL_YEAR equal to the
                user selected fiscal year and O_ORGANIZATIONAL_UNITS.ORG_CODE equal to
                the user selected Local Agency for each O_STAFF_TIME_STUDIES service.
Other Operating Costs -
                SUM(O_ANNUAL_WIC_COST_SUMMARIES.OTHER_OPERATING_COSTS) for
                all records with O_ANNUAL_WIC_COST_SUMMARIES.FISCAL_YEAR equal to
                the user selected fiscal year and O_ORGANIZATIONAL_UNITS.ORG_CODE equal

to the user selected Local Agency for each O_STAFF_TIME_STUDIES service.

Capital Costs - SUM(O_ANNUAL_WIC_COST_SUMMARIES.CAPITAL_COSTS) for all records with O_ANNUAL_WIC_COST_SUMMARIES.FISCAL_YEAR equal to the user selected fiscal year and O_ORGANIZATIONAL_UNITS.ORG_CODE equal to the user selected Local Agency for each O_STAFF_TIME_STUDIES service.

Indirect Costs - SUM(O_ANNUAL_WIC_COST_SUMMARIES.INDIRECT_COSTS) for all records with O_ANNUAL_WIC_COST_SUMMARIES.FISCAL_YEAR equal to the user selected fiscal year and O_ORGANIZATIONAL_UNITS.ORG_CODE equal to the user selected Local Agency for each O_STAFF_TIME_STUDIES service.

Total (rows) - SUM(Personnel & ERE + Professional & Outside Services +Travel Costs + Occupancy Costs + Other Operating Costs + Capital Costs + Indirect Costs) for each O_STAFF_TIME_STUDIES service.

Total(columns) - SUM(Client Services, Nutrition Education, Breast Feeding Promotion, Administration, Immunization, CSFP, Tobacco, and Other) for each O_ANNUAL_WIC_COST_SUMMARIES activity.

Date - This spot will contain the date of the signature.

Signature of Program Director - This spot will contain the signature of the program's director

Sort Criteria (Major to Minor):

Organizational Unit (Ascending)

Background Process(es)

None.

Operations Management

Section 5 - 3.2.13 Producing a Local Agency Annual Report

Report: No database name.

This report is contained in a WordPerfect Document to be used by each Local Agency Director.